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Financial Institutions Conference (BANK)

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Tuesday, May 21, 2013
 Radisson Paper Valley Hotel, Appleton

Pre-Conference

Registration & Networking
7:30am-8:30am

Welcome & Opening Remarks
8:30am-8:40am

[Brett D. Schwantes, CPA](#)
 Senior Manager / Wipfli LLP
 Wausau, WI

General Session

Seizing the Opportunities Panel
8:40am-9:45am

[R. Clark Locke, CFA](#)
 Managing Director / Hovde Financial Inc.
 Inverness, IL

AND

[Dennis R. Wendte, J.D.](#)
 Partner / Barack Ferrazzano Kirschbaum & Nagelberg LLP
 Chicago, IL

AND

[Bill McDonald](#)
 President & CEO / Greenwoods State Bank
 Lake Mills, WI

AND

[Donald Meyer](#)

This session will bring you the knowledge and experience of our panel, who offer a diverse set of backgrounds and real-life experiences. You will hear the acquisition and investment process that was followed, the pitfalls along the way, how due diligence was performed, and the value proposition and thesis of the investment. You will also hear how one local investor views the opportunity of investing in and growing a Wisconsin community bank into the future.

General Session

Legal & Regulatory Compliance Panel

9:55am-11:00am

[John T. Reichert, J.D.](#)

Shareholder / Godfrey & Kahn S.C.

Milwaukee, WI

AND

[Peter Wilder](#)

Godfrey & Kahn S.C.

Milwaukee, WI

AND

[Jim Shankle, CFSA](#)

Managing Director / Crosscheck Compliance

Chicago, IL

With rulemaking under the Dodd-Frank Act continuing at a steady pace, community banks in Wisconsin are challenged to stay ahead of all the new legal and compliance issues facing their institutions. This panel will provide an update on these current and emerging legal and regulatory compliance issues, along with tips on how to avoid being caught off guard during your next compliance examination.

Concurrent Sessions

7 Challenges Facing Financial Institutions & How to Respond

11:10am-12:00pm

[Thomas Farin](#)

President & CEO / Farin & Associates, Inc.

Fitchburg, WI

This presentation will provide recommendations on how to address seven key challenges facing financial institutions in 2013, including:

1. Basel III Capital Regulations - The fact they are already being enforced in the field underscores the importance of capital planning.
2. Stress testing - Importance of using stress tests in determining how much capital buffer to carry over regulatory minimums.
3. Nonmaturity deposit behavior - Accurate pricing betas and decay rates are crucial and demanded by regulators.
4. Deposit strategy for rising rates - How it affects the modeling you are doing now and the actions to take when it happens.
5. Loan pricing - Making sure loans are well-priced relative to their risks and costs.
6. Booking profitable loans - May require that you think outside the box.
7. Turning ALCO into a profit center - Management decision making based on risk/return tradeoffs.

Mobile Banking & How to Manage the Risks

11:10am-12:00pm

[Tammy Wollersheim, CISA, CRISC](#)

Senior Manager / Wipfli LLP

Madison, WI

AND

[Kathy Ligman](#)

AVP, Product Management / Fiserv, Inc.

Brookfield, WI

Mobile banking and payments services are becoming increasingly important in financial services as more and more consumers are becoming mobile dependent. This session will provide an overview of the mobile banking and payments market, discuss internal preparations prior to implementation of mobile banking, oversight activities once implemented, and share practical advice to ensure you are well-positioned for the future.

- [Conference Description](#)
- [Conference Agenda](#)

Lunch

- [Conference](#)

[Location](#) **Regular Meal**
12:00pm-1:10pm

- [Conference Pricing](#)

Vegetarian Meal
12:00pm-1:10pm

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Luncheon Speaker

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State of Community Banking in Wisconsin
12:20pm-1:10pm

[Rose Oswald Poels, J.D.](#)

*President & CEO / Wisconsin Banker Association
 Madison, WI*

The 267 banks chartered in Wisconsin have a tremendous impact on the growth of our local communities and the state's economy. However, banks are facing growing earnings pressures due in part to increased expenses and a scarce source of future capital. This presentation will review the tremendous positive impact Wisconsin's community banks have on the state while highlighting challenges facing the industry.

General Session

Audit & Accounting Update
1:10pm-1:35pm

[Joseph D. Paroubek, CPA](#)

*Manager / Wipfli LLP
 Milwaukee, WI*

This presentation will help ensure you're up to date on current standards in accounting and audit guidance that are in the process of being finalized as policies that will apply to financial institutions.

Federal Tax Update for Financial Institutions
1:35pm-2:05pm

[Sequoia S. Borgman, CPA](#)

*Milwaukee Tax Practice Leader / McGladrey LLP
 Milwaukee, WI*

AND

[Zachary R. Rieboldt, CPA, J.D.](#)

*McGladrey LLP
 Milwaukee, WI*

This session will provide an overview of recent tax law changes that will impact financial institutions, including a discussion of provisions of the American Taxpayer Relief Act of 2012, IRS audit initiatives, and administrative law and policy updates.

General Session

Planning Now for the New Health Care Legislation
2:15pm-3:05pm

[Thomas J. Nichols, CPA, J.D.](#)

*Meissner Tierney Fisher & Nichols S.C.
 Milwaukee, WI*

The 2010 Health Care Legislation is intended to drastically reform the payment and provision of health care services throughout the American economy. The focus of this presentation will be its impact on tax and other planning. The increased self-employment/FICA tax on upper income individuals, as well as the new Medicare tax on unearned income, will obviously affect choice of entity and other tax planning. However, the complex new rules designed to bring about a dramatic expansion in the number of individuals covered by health insurance will

also have an impact on virtually all employer fringe benefit programs. The goal of this presentation will be to provide an overview and approach on how to handle these new issues.

Closing Session

U.S. & Global Economic Outlook

3:15pm-4:30pm

[Michael M. Knetter, Ph.D.](#)

President & CEO / University of Wisconsin Foundation
Madison, WI

This session examines the short-term and long-term macroeconomic outlook for the U.S. economy with particular attention to risks posed by international factors and fiscal challenges faced by governments around the world. Attention will also be given to causes and consequences of the rise in inequality of income and wealth and their impact on politics and regulation.

Closing Remarks & Raffle

4:30pm-4:40pm

[Brett D. Schwantes, CPA](#)

Senior Manager / Wipfli LLP
Wausau, WI

As a thank you for stopping by our sponsors along the way, each attendee who visits every exhibit and turns in his or her tour card by 3:15 p.m. will be entered in the drawings at the end of the conference for a \$150, \$100 and \$50 Visa Gift Card!

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